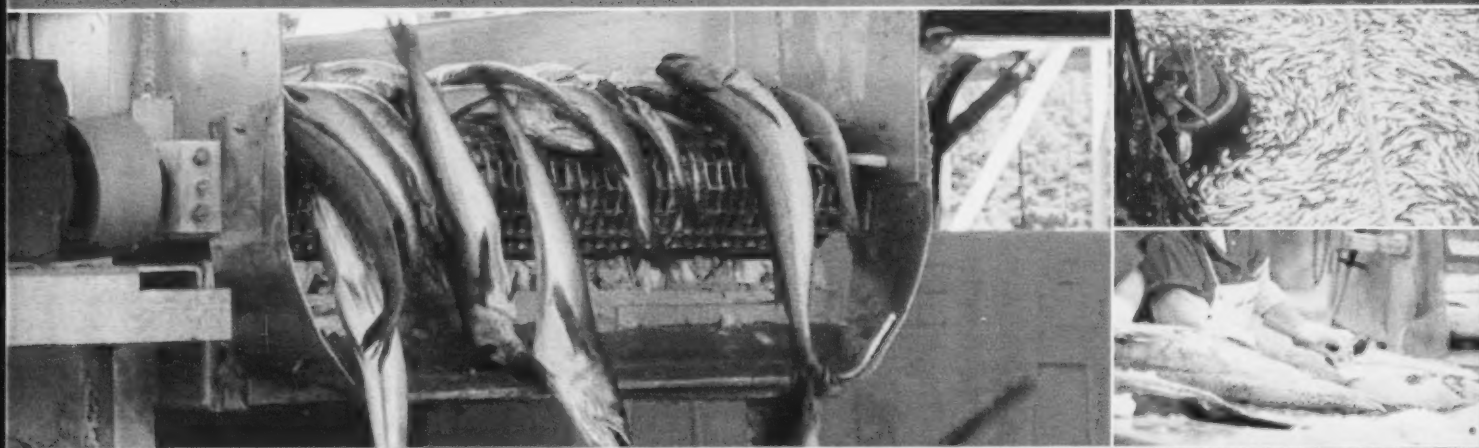


# 2011

YEAR IN REVIEW

► BRITISH COLUMBIA  
SEAFOOD INDUSTRY



Ministry of  
Agriculture



## A message from The **MINISTER** of **AGRICULTURE**



Welcome to the Ministry of Agriculture's 2011 Seafood Industry Year in Review. The report is a statistical summary of British Columbia's seafood production and exports and offers an introduction to this diverse industry.

In 2011, B.C. seafood was served in approximately two billion meals in 73 countries. Our products are internationally respected as safe and secure and that makes them more attractive in many markets. Seafood products are safer than ever, thanks to our strict and stringent safety protocols. As part of our agrifoods strategy, the Province is building on these B.C. advantages to expand our markets – both locally and internationally.

British Columbia is Canada's gateway to the Pacific and we are leveraging our access to Asia, with particular focus on emerging markets like Taiwan, China and Korea. B.C.'s reputation as a global leader in seafood production is already being recognized in China, our biggest Asian market, where seafood exports increased by 37 per cent to a record-setting \$109 million in 2011.

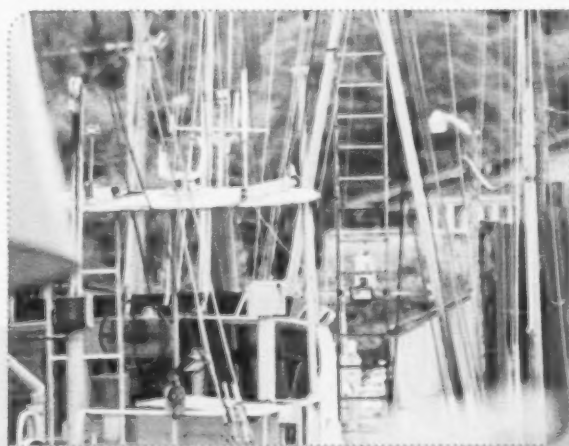
As our trading relationship with Asia grows so do the opportunities for B.C. seafood producers and investors. Last year B.C. exported about \$911 million worth of seafood, with exports to Asia accounting for about a third of that total. I look forward to the continuing growth of this market in the years to come.

British Columbia's seafood industry has a combined wholesale value of \$1.4 billion and provides thousands of jobs in the aquaculture and commercial fishing and seafood processing sectors, most of which supply stable, skilled and well-paid employment to our island and coastal communities.

To learn more about B.C.'s seafood sector, please visit [www.bcseafood.ca](http://www.bcseafood.ca). The B.C. 2011 Agrifood Industry Year in Review can be viewed at the Ministry of Agriculture's website: [www.gov.bc.ca/agri](http://www.gov.bc.ca/agri).

A stylized, handwritten signature of Norm Letnick in black ink, consisting of a long horizontal line with a loop and a crossbar.

**Norm Letnick**  
*Minister of Agriculture*



# BRITISH COLUMBIA SEAFOOD PRODUCTION 2009 - 2011

|                         |                                | HARVEST ('000 Tonnes) |              |              |                | LANDED VALUE (\$ millions) |              |              |                | WHOLESALE VALUE (\$ millions) |                |                |                |
|-------------------------|--------------------------------|-----------------------|--------------|--------------|----------------|----------------------------|--------------|--------------|----------------|-------------------------------|----------------|----------------|----------------|
|                         |                                | 2009P                 | 2010P        | 2011E        | % change 10/11 | 2009P                      | 2010P        | 2011E        | % change 10/11 | 2009P                         | 2010P          | 2011E          | % change 10/11 |
| SALMON                  | Chinook                        | 0.9                   | 1.2          | 1.1          | -8.3           | 7.1                        | 9.6          | 9.8          | 2.1            | 16.1                          | 18.5           | 20.1           | 8.6            |
|                         | Chum                           | 2.7                   | 0.5          | 5.8          | 1060.0         | 4.3                        | 0.9          | 10.6         | 1077.8         | 21.1                          | 9.7            | 30.2           | 211.3          |
|                         | Coho                           | 0.8                   | 0.6          | 1.1          | 83.3           | 3.0                        | 2.6          | 4.8          | 84.6           | 23.9                          | 20.5           | 22.6           | 10.2           |
|                         | Pink                           | 13.4                  | 1.3          | 9.2          | 607.7          | 67                         | 0.7          | 8.8          | 1157.1         | 41.8                          | 16.8           | 37.6           | 123.8          |
|                         | Sockeye                        | 0.7                   | 20.0         | 3.0          | -85.0          | 2.6                        | 56.8         | 12.2         | -78.5          | 19.2                          | 174.4          | 97.4           | -44.2          |
|                         | <b>Wild Salmon<sup>1</sup></b> | <b>18.5</b>           | <b>23.6</b>  | <b>20.4</b>  | <b>-13.6</b>   | <b>23.7</b>                | <b>70.6</b>  | <b>46.2</b>  | <b>-34.6</b>   | <b>143.5</b>                  | <b>240.9</b>   | <b>208.4</b>   | <b>-13.5</b>   |
|                         | Atlantic                       | 72.7                  | 74.5         | 79.4         | 6.6            | 370.5                      | 470.3        | 408.9        | -13.1          | 461.0                         | 520.2          | 510.3          | -1.9           |
|                         | Pacific <sup>2</sup>           | 3.6                   | 4.7          | 3.8          | -9.5           | 23.7                       | 29.4         | 26.4         | -10.2          | 32.5                          | 39.7           | 40.0           | 0.8            |
|                         | <b>Cultured Salmon</b>         | <b>76.3</b>           | <b>78.7</b>  | <b>83.2</b>  | <b>5.7</b>     | <b>394.2</b>               | <b>499.7</b> | <b>435.3</b> | <b>-12.9</b>   | <b>493.5</b>                  | <b>559.9</b>   | <b>550.3</b>   | <b>-1.7</b>    |
|                         | <b>SALMON</b>                  | <b>94.8</b>           | <b>102.3</b> | <b>103.6</b> | <b>1.3</b>     | <b>417.9</b>               | <b>570.3</b> | <b>481.5</b> | <b>-15.6</b>   | <b>637.0</b>                  | <b>800.8</b>   | <b>758.7</b>   | <b>-5.3</b>    |
| HERRING                 | Spawn on Kelp <sup>3</sup>     | 0.13                  | 0.11         | 0.10         | -9.1           | 1.60                       | 0.60         | 1.00         | 66.7           | 2.20                          | 1.10           | 1.20           | 18.2           |
|                         | Roe Herring                    | 11.6                  | 9.3          | 6.6          | -29.0          | 15.5                       | 10.6         | 2.2          | -79.2          | 59.9                          | 39.9           | 25.7           | -58.6          |
|                         | Food and Bait                  | 0.6                   | 0.7          | 0.7          | 0.0            | 0.5                        | 0.6          | 0.6          | 0.0            | 3.2                           | 3.1            | 3.0            | -3.2           |
|                         | <b>HERRING</b>                 | <b>12.3</b>           | <b>10.1</b>  | <b>7.4</b>   | <b>-26.8</b>   | <b>17.6</b>                | <b>11.8</b>  | <b>3.8</b>   | <b>-67.8</b>   | <b>65.3</b>                   | <b>44.1</b>    | <b>30.0</b>    | <b>-32.0</b>   |
| GROUND FISH             | Arrowtooth Hounder             | 3.9                   | 3.4          | 5.0          | 47.1           | 1.5                        | 1.5          | 2.0          | 33.3           | 3.0                           | 2.5            | 4.3            | 72.0           |
|                         | Dogfish                        | 4.3                   | 1.9          | 1.0          | -47.4          | 2.0                        | 1.0          | 0.5          | -50.0          | 7.7                           | 3.9            | 2.1            | -46.2          |
|                         | Hake                           | 56.2                  | 55.6         | 55.4         | -0.4           | 14.2                       | 16.9         | 16.5         | -2.4           | 51.4                          | 52.2           | 62.2           | 19.2           |
|                         | Hallibut                       | 4.1                   | 4.1          | 4.0          | -2.4           | 31.5                       | 32.5         | 45.6         | 21.6           | 113.1                         | 171.9          | 180.7          | 7.7            |
|                         | Lingcod                        | 2.1                   | 1.6          | 1.7          | 6.2            | 4.5                        | 3.5          | 4.0          | 14.3           | 8.9                           | 8.3            | 8.3            | 0.0            |
|                         | Pacific Cod                    | 1.0                   | 2.0          | 1.9          | -5.0           | 1.5                        | 2.5          | 3.0          | 20.0           | 3.2                           | 3.8            | 5.1            | 34.2           |
|                         | Pollock                        | 3.4                   | 3.7          | 4.0          | 8.1            | 2.0                        | 1.5          | 2.0          | 33.3           | 5.6                           | 3.7            | 6.1            | 64.9           |
|                         | Rockfish                       | 18.1                  | 17.9         | 18.0         | 0.6            | 22.5                       | 20.0         | 26.0         | 30.0           | 37.3                          | 36.0           | 45.4           | 26.1           |
|                         | Sablefish                      | 2.6                   | 2.4          | 2.2          | -8.3           | 24.0                       | 22.5         | 27.2         | 20.9           | 29.9                          | 26.0           | 34.1           | 31.2           |
|                         | Solms                          | 4.2                   | 3.9          | 5.0          | 28.7           | 3.5                        | 3.5          | 5.5          | 57.1           | 8.6                           | 8.9            | 13.1           | 47.2           |
|                         | Other <sup>4</sup>             | 0.9                   | 1.1          | 1.4          | 27.3           | 1.5                        | 1.5          | 2.0          | 33.3           | 12.7                          | 14.4           | 16.7           | 16.0           |
|                         | <b>GROUND FISH</b>             | <b>100.8</b>          | <b>97.6</b>  | <b>99.6</b>  | <b>2.0</b>     | <b>108.7</b>               | <b>111.9</b> | <b>134.3</b> | <b>20.0</b>    | <b>301.4</b>                  | <b>281.6</b>   | <b>328.1</b>   | <b>16.5</b>    |
| SHELLFISH               | Clams                          | 1.4                   | 1.5          | 1.3          | -13.3          | 7.4                        | 8.1          | 7.2          | -11.1          | 12.6                          | 12.4           | 12.7           | 2.4            |
|                         | Oysters                        | 5.7                   | 7.6          | 7.5          | -1.3           | 7.0                        | 9.0          | 9.2          | 2.2            | 14.0                          | 14.5           | 15.0           | 3.4            |
|                         | Scallops & Other               | 0.7                   | 1.0          | 0.6          | -40.0          | 3.1                        | 4.9          | 3.2          | -34.7          | 3.7                           | 7.9            | 3.7            | -53.2          |
|                         | <b>Cultured Shellfish</b>      | <b>7.8</b>            | <b>10.1</b>  | <b>9.4</b>   | <b>-6.9</b>    | <b>17.5</b>                | <b>22.0</b>  | <b>19.6</b>  | <b>-10.9</b>   | <b>30.3</b>                   | <b>34.8</b>    | <b>31.4</b>    | <b>-9.8</b>    |
|                         | Clams                          | 0.8                   | 0.7          | 0.6          | -14.3          | 2.0                        | 1.8          | 1.3          | -27.8          | 2.9                           | 2.7            | 2.0            | -25.9          |
|                         | Crabs                          | 5.6                   | 5.2          | 5.0          | -3.8           | 32.2                       | 33.7         | 32.5         | -3.6           | 56.3                          | 73.1           | 57.0           | -22.0          |
|                         | Geoducks                       | 1.6                   | 1.6          | 1.6          | 0.0            | 31.8                       | 40.9         | 41.3         | 1.0            | 42.7                          | 51.8           | 46.6           | -10.0          |
|                         | Scallops                       | 0.02                  | 0.01         | 0.01         | 0.0            | 0.2                        | 0.2          | 0.2          | 0.0            | 0.3                           | 0.3            | 0.3            | 0.0            |
|                         | Sea Cucumbers                  | 1.5                   | 1.5          | 1.7          | 13.3           | 3.0                        | 4.0          | 6.5          | 62.5           | 6.3                           | 6.4            | 10.8           | 68.8           |
|                         | Sea Urchins: Red               | 2.1                   | 2.2          | 2.5          | 13.6           | 2.6                        | 2.7          | 3.7          | 37.0           | 8.5                           | 8.2            | 8.5            | 3.7            |
|                         | Sea Urchins: Green             | 0.11                  | 0.11         | 0.06         | -45.5          | 0.4                        | 0.4          | 0.2          | -50.0          | 1.2                           | 0.8            | 0.3            | -62.5          |
|                         | Shrimp                         | 0.7                   | 0.5          | 0.5          | 0.0            | 1.3                        | 1.0          | 1.0          | 0.0            | 4.9                           | 4.3            | 3.7            | -14.0          |
|                         | Prawns                         | 3.4                   | 2.2          | 2.8          | 27.3           | 33.0                       | 23.7         | 40.0         | 68.8           | 50.6                          | 37.9           | 69.5           | 83.4           |
|                         | Other <sup>5</sup>             | 0.1                   | 0.3          | 0.2          | -33.3          | 0.4                        | 0.5          | 0.5          | 0.0            | 2.6                           | 4.6            | 3.3            | -28.3          |
|                         | <b>Wild Shellfish</b>          | <b>15.9</b>           | <b>14.3</b>  | <b>15.0</b>  | <b>4.5</b>     | <b>106.9</b>               | <b>108.9</b> | <b>126.7</b> | <b>16.3</b>    | <b>176.3</b>                  | <b>190.1</b>   | <b>202.0</b>   | <b>6.3</b>     |
|                         | <b>SHELLFISH</b>               | <b>23.7</b>           | <b>24.4</b>  | <b>24.4</b>  | <b>-0.2</b>    | <b>124.4</b>               | <b>130.9</b> | <b>146.3</b> | <b>11.8</b>    | <b>206.6</b>                  | <b>224.9</b>   | <b>233.4</b>   | <b>3.8</b>     |
| OTHER                   | Tuna                           | 5.7                   | 6.5          | 5.4          | -16.9          | 16.2                       | 22.2         | 28.7         | 26.4           | 77.9                          | 47.7           | 48.2           | 1.0            |
|                         | Sardines                       | 15.3                  | 22.2         | 20.7         | -6.8           | 2.5                        | 3.7          | 3.6          | -2.7           | 16.2                          | 23.8           | 21.5           | -9.7           |
|                         | Other Wild <sup>6</sup>        | 0.3                   | 0.3          | 0.3          | 0.0            | 1.5                        | 1.5          | 1.5          | 0.0            | 5.5                           | 3.7            | 7.1            | 91.9           |
|                         | Other Cultured <sup>7</sup>    | 2.0                   | 2.8          | 1.2          | -57.1          | 11.1                       | 16.9         | 10.5         | -37.9          | 12.3                          | 18.8           | 11.7           | -37.8          |
|                         | <b>OTHER</b>                   | <b>23.3</b>           | <b>31.8</b>  | <b>27.6</b>  | <b>-13.2</b>   | <b>31.3</b>                | <b>44.8</b>  | <b>44.3</b>  | <b>-1.1</b>    | <b>61.9</b>                   | <b>94.0</b>    | <b>88.5</b>    | <b>-5.9</b>    |
| <b>GRAND TOTAL B.C.</b> |                                | <b>255.0</b>          | <b>266.2</b> | <b>262.6</b> | <b>-1.4</b>    | <b>699.9</b>               | <b>869.7</b> | <b>810.2</b> | <b>-6.8</b>    | <b>1,272.2</b>                | <b>1,445.4</b> | <b>1,438.7</b> | <b>-0.5</b>    |

<sup>1</sup>The total wholesale value of wild salmon includes the value of offal, meal and oil which cannot be identified by species.

<sup>2</sup>Pacific cultured salmon includes chinook, coho and sockeye.

<sup>3</sup>The herring spawn on kelp harvest is not of whole herring, but the eggs which have adhered to blades of kelp after herring have spawned.

<sup>4</sup>"Other" includes skate, flounder and the value of groundfish meal and oil which cannot be identified by species.

<sup>5</sup>Includes octopus, squid and other unspecified shellfish.

<sup>6</sup>"Other-Wild" includes marine plants, mackerel and other unspecified finfish.

<sup>7</sup>"Other-Cultured" includes marine plants, freshwater trout, sablefish, sturgeon, tilapia, abalone, crayfish and sea cucumbers.

**E** ESTIMATES - Volume and value estimates are derived from information available to August 2012 that has been adjusted to account for missing data.

**P** PRELIMINARY - Volume and values are revised from the previously published estimates but are not yet final.

## ► 2011 HIGHLIGHTS

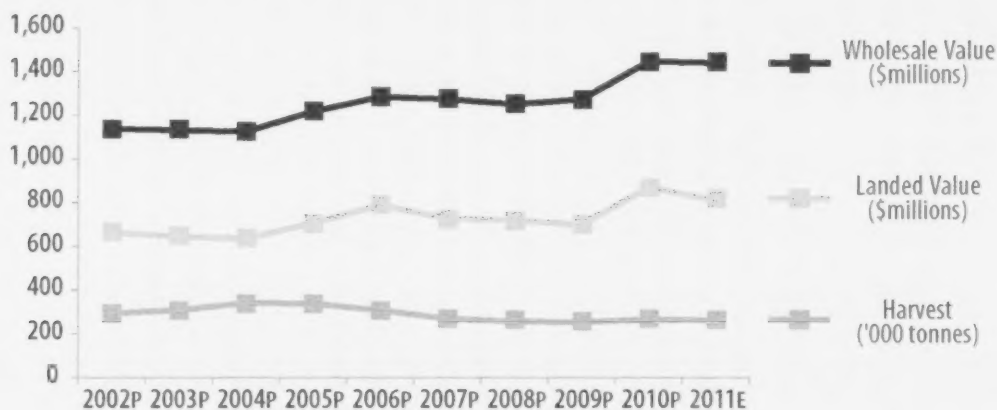
*British Columbia offered 476 distinct fish and seafood commodities in 2011 with a combined wholesale value of \$1.4 billion.*

More than 100 species of fish, shellfish and marine plants were produced from British Columbia's oceans and fresh waters in 2011. Provincial production totalled 262,600 tonnes with a landed value of \$810.2 million. Commercial capture fisheries harvested 168,800 tonnes worth \$344.8 million to the fishers, while aquaculture operations produced 93,800 tonnes with a farm-gate value of \$465.4 million.

B.C. seafood was served in approximately two billion meals in 73 countries as export shipments totalled 178,000 tonnes valued at \$911 million.

B.C.'s finfish capture fisheries continue to achieve new Marine Stewardship Council certifications. In July 2011, three pink salmon fisheries covering all gear types were approved and in September our spiny dogfish hook and line fishery became the first certified shark fishery in the world.

► BRITISH COLUMBIA SEAFOOD PRODUCTION 2002 – 2011



### HARVEST:

The round (whole) weight of the fish harvested from British Columbia capture fisheries and aquaculture operations. One tonne equals 2,204.6 pounds.

### LANDED VALUE:

The price paid to the commercial fishers and/or aquaculture for the whole fish. In aquaculture this can also be referred to as farm-gate value.

### WHOLESALE VALUE:

The value of the fish post processing. All of the British Columbia harvest is included in the wholesale value as well as any fish imported from outside British Columbia that has undergone significant processing within the province.

## ▶ INDUSTRY PERFORMANCE

### *British Columbia Commercial Capture (Wild) & Cultured Seafood Production 2009 – 2011*

|                         | HARVEST ('000 Tonnes) |              |              |                | LANDED VALUE (\$ millions) |              |              |                | WHOLESALE VALUE (\$ millions) |                |                |                |
|-------------------------|-----------------------|--------------|--------------|----------------|----------------------------|--------------|--------------|----------------|-------------------------------|----------------|----------------|----------------|
|                         | 2009P                 | 2010P        | 2011E        | % change 10/11 | 2009P                      | 2010P        | 2011E        | % change 10/11 | 2009P                         | 2010P          | 2011E          | % change 10/11 |
| Commercial Capture      | 168.9                 | 174.6        | 168.8        | -3.4           | 277.1                      | 331.1        | 344.8        | 4.1            | 736.1                         | 831.9          | 845.3          | 1.6            |
| Cultured                | 86.1                  | 91.6         | 93.8         | 2.4            | 422.8                      | 538.6        | 465.4        | -13.6          | 536.1                         | 613.5          | 593.4          | -3.3           |
| <b>GRAND TOTAL B.C.</b> | <b>255.0</b>          | <b>266.2</b> | <b>262.6</b> | <b>-1.4</b>    | <b>699.9</b>               | <b>869.7</b> | <b>810.2</b> | <b>-6.8</b>    | <b>1,272.2</b>                | <b>1,445.4</b> | <b>1,438.7</b> | <b>-0.5</b>    |

▶ **HARVESTS** With a 262,600-tonne harvest in 2011, British Columbia produced 3,600 fewer tonnes of seafood than in 2010. Significant decreases in harvests occurred in several species groups in 2011. The herring fishery experienced a 27 per cent decline as fishers employed selective harvesting techniques which resulted in reduced harvest of non-target herring while the wild salmon fishery showed a 14 per cent decline as the sockeye harvest returned to historical levels after the bounty harvests of 2010. The combined "other species" fisheries harvest was down 13 per cent primarily in the sardine fishery which had a lower total allowable catch in 2011 from 2010. Species groups showing harvest increases in 2011 were groundfish with a 2,000 tonne increase (up two per cent) and wild shellfish with a 700 tonne increase (up more than four per cent). B.C.'s total salmon harvest rose slightly as cultured salmon production increased by close to six per cent.

▶ **LANDED VALUE** British Columbia's capture and culture operations combined to generate \$810.2 million in landed value in 2011 – a seven per cent decrease over 2010. Notable decreases occurred in the herring fishery with a 68 per cent decline in landed value, followed by the wild salmon fishery with a decrease of 35 per cent and cultured salmon down by 13 per cent. The two fisheries that showed an increase in landed value in 2011 were the groundfishery (up 20 per cent) and the wild shellfishery (up 16 per cent).

▶ **WHOLESALE VALUE** The total wholesale value of British Columbia seafood products remained fairly constant, at \$1.44 billion, with an overall decline of less than one per cent. Similar to landed value, the herring sector showed the greatest decline (down 32 per cent), followed by cultured shellfish (down 10 per cent), salmon with a five per cent decline and the "other species" category with a six per cent decline. Both groundfish and shellfish recorded increases in wholesale value of close to 17 per cent and 4 per cent respectively in 2011.



## The SALMON Story

**SALMON products** generated 53% of the total wholesale value of all B.C. seafood.

*British Columbia's salmon production, at 103,600 tonnes in 2011, increased slightly over 2010 and accounted for 40 per cent of all seafood production in B.C.*

Cultured salmon operations saw a six per cent increase in production to 83,200 tonnes, with cultured Atlantic salmon making up 79,400 tonnes (95 per cent) of the total. Following the record-breaking returns in 2010, sockeye salmon harvests fell substantially from 20,000 to the more historic level of 3,000 tonnes in 2011. At the same time, other commercial salmon fisheries remained healthy, with catch increases in chinook, chum, coho, and pink salmon species.

The landed value of the combined salmon harvest was down 16 per cent in 2011 to \$481.5 million. Generally, cultured salmon garners higher landed (farm-gate) values than wild salmon due to the value added processing, sales and distribution network integrated into the aquaculture industry. In 2011, cultured salmon generated \$435.3 million in sales, representing 90 per cent of the total landed value of all B.C. salmon production, while capture fisheries generated \$46.2 million, accounting for the remaining 10 per cent. Of wild salmon species, the landed values for chinook, chum, coho and pink salmon increased in 2011.

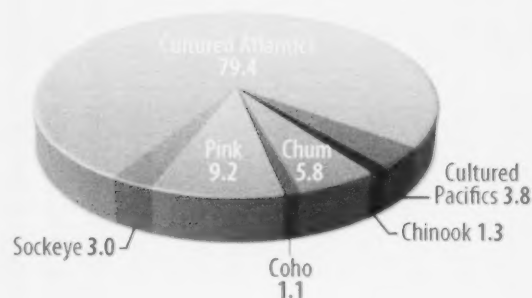
The sale of salmon products (including \$9 million of imported salmon turned into value-added products in B.C.) generated a total wholesale value of \$758.7 million in 2011 – a five per cent decrease from 2010. Cultured salmon products totaled \$550.3 million in wholesale value, and accounted for 73 per cent of the total salmon wholesale value while capture salmon products totaled \$208.4 million and accounted for the remaining 27 per cent share.

### Where does our SALMON go?

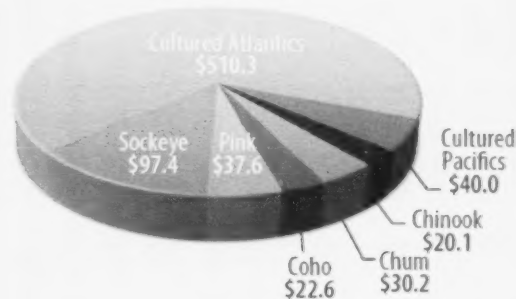
B.C. exported \$467.2 million worth of salmon products in 2011, the largest among all seafood sectors. Cultured Atlantic salmon accounted for \$313.8 million, or 67 per cent of total salmon exports. The United States and Japan are the top two markets for cultured salmon.

Top markets for wild salmon exports include the United States, Japan, United Kingdom, France, and China. Exports of pink, chinook, chum and coho salmon all grew in 2011, while sockeye salmon exports fell 69 per cent reflecting the reduced volume of shipments in 2011 compared to the previous year.

**B.C. SALMON HARVEST**  
(‘000 TONNES)



**B.C. SALMON WHOLESALE VALUE**  
(\$ MILLIONS)



## The **HERRING** Story

*British Columbia's roe herring harvest declined 29 per cent in 2011 as fishers employed selective harvesting methods to target optimum-sized fish and to ensure consistent herring roe product quality for their niche markets.*

The combined harvest from the three fisheries (food & bait, spawn on kelp, and roe herring) fell 27 per cent to 7,400 tonnes. The total landed value of the combined fisheries generated \$3.8 million and was down 68 per cent from 2010. Herring products generated a combined wholesale value of \$30 million, down 32 per cent. Japan, China and the U.S. are B.C.'s top markets for herring products.

In 2011, 89 per cent, (6,600 tonnes) of B.C.'s herring harvest occurred in the roe herring fishery. The landed value of the roe herring fishery (\$2.2 million) contributed 58 per cent of the total landed value of herring. Sales of roe herring products (herring roe, herring meal and oil), generated \$25.7 million in wholesale value and represented an 86 per cent share of the total herring wholesale value.

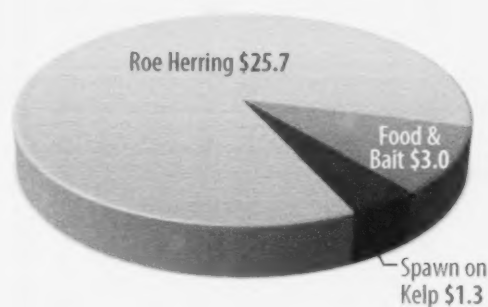
The herring food and bait fishery made up nine per cent of the total herring harvest as production stayed constant at 700 tonnes in 2011. The value of the harvest remained unchanged at \$600,000. Sales of finished food and bait products generated \$3 million for a 10 per cent share of the herring wholesale value.

Herring spawn-on-kelp (SOK) harvests were down nine per cent in 2011 to 100 tonnes. This small harvest generated 26 per cent (\$1 million) of the total herring landed value. SOK products generated \$1.3 million in wholesale value.

**B.C. HERRING HARVEST**  
( '000 TONNES)



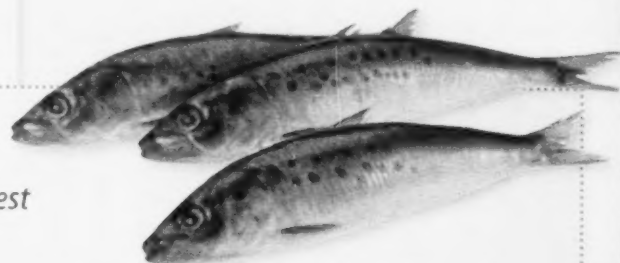
**B.C. HERRING WHOLESALE VALUE**  
(\$ MILLIONS)



## The **OTHER** Story

*More than 10 per cent of British Columbia's seafood harvest comes from lesser known or less abundant species.*

In 2011, 27,600 tonnes of "other species" were harvested including 5,400 tonnes of albacore tuna, and 20,700 tonnes of sardines. These two species along with minor cultured and capture species combined to generate \$44.3 million in landed value and \$88.5 million in wholesale value of processed products.



## The **GROUNDFISH** Story

*In 2011, 63 per cent of British Columbia's groundfish harvest was from Marine Stewardship Council certified sustainable fisheries.*

The 99,600-tonne groundfish harvest was up two per cent from 2010 and represented 38 per cent of all seafood production in the province.

At 55,400 tonnes, Pacific hake had the largest harvest of all commercially captured species for a 56 per cent share of the total groundfishery and 21 per cent of the provincial seafood total. Most of B.C.'s hake fishery is delivered to processors in frozen dressed form and is destined for overseas. Primary hake markets include Russian Federation, Ukraine, China, Lithuania, and the United States.

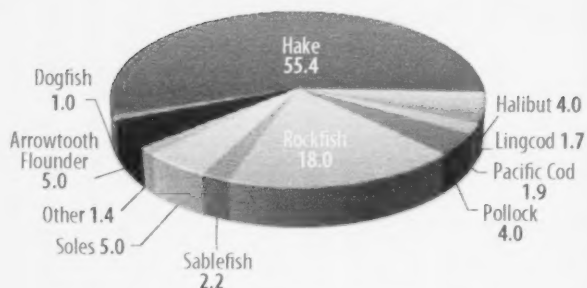
Rockfish species represented 18 per cent of the groundfish harvest and 19 per cent of the landed value, while halibut accounted for just four per cent of the harvest volume but, at \$45.6 million, represented 34 per cent of the total groundfish landed value.

Most of the major groundfish species experienced declines in harvest volumes in 2011. Species showing significant declines included: dogfish (down 47 per cent), sablefish (down eight per cent) and Pacific cod (down five per cent). Notable increases in harvest were recorded for arrowtooth flounder (up 47 per cent), soles (28 per cent) and the combined "other groundfish species" category (up 27 per cent).

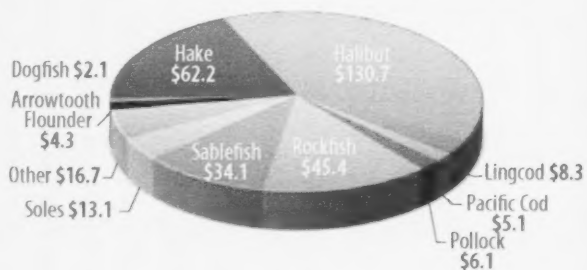
The total groundfish landed value increased 20 per cent to \$134.3 million in 2011, contributing 17 per cent of the total landed value of B.C. total seafood harvest. The value of sole rose 57 per cent to \$5.5 million, while both pollock and arrowtooth flounder rose 33 per cent to \$2 million each. Rockfish landed values increased by 30 per cent to \$26 million, halibut by 22 per cent to \$45.6 million, sablefish by 21 per cent to \$27.2 million, Pacific cod by 20 per cent to \$3 million and lingcod by 14 per cent to \$4 million.

Although British Columbia groundfish continues to meet strong competition in the global whitefish fillet market, the wholesale value of groundfish products increased 17 per cent to \$328.1 million. Every species other than dogfish reported an increase in wholesale value in 2011, including: arrowtooth flounder (72 per cent), pollock (65 per cent), soles (47 per cent), Pacific cod (34 per cent), sablefish (31 per cent), rockfish (26 per cent), hake (19 per cent) and halibut (seven per cent).

**B.C. GROUNDFISH HARVEST**  
(<sup>'000</sup> TONNES)



**B.C. GROUNDFISH WHOLESALE VALUE**  
(\$ MILLIONS)



## ► Spotlight on:

# SUSTAINABLE FISHERIES in BRITISH COLUMBIA

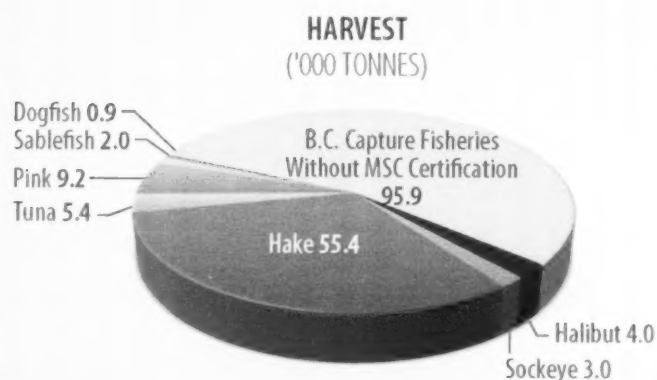
## ► WHAT IS MSC CERTIFICATION?

The Marine Stewardship Council (MSC) eco-label is fully consistent with the United Nations Food and Agriculture Organization guidelines for eco-labeling, and is considered the global standard

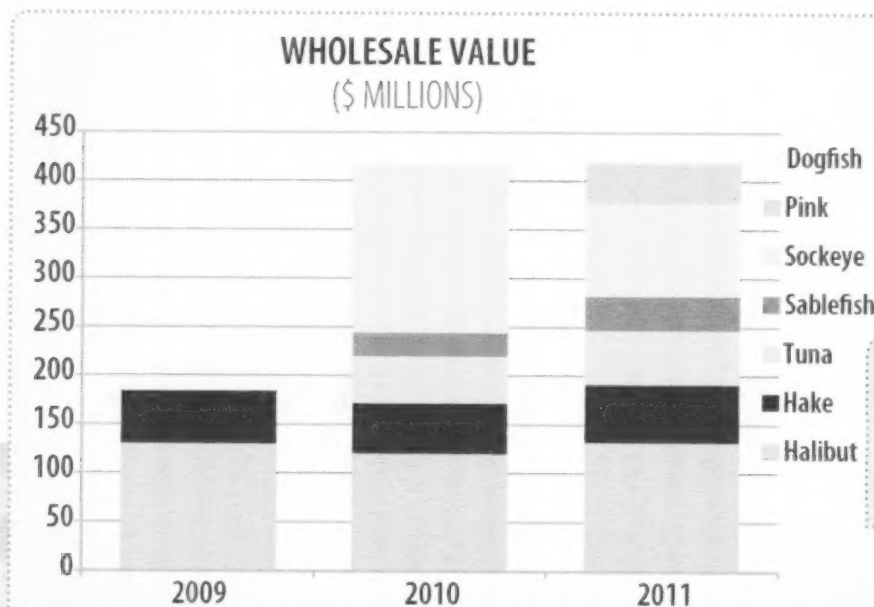
for fisheries sustainability. Every MSC certified fishery has demonstrated that it maintains sustainable fish stocks, minimizes environmental impacts and is effectively managed.

**MSC certification can only be achieved by capture fisheries.**

## ► MSC CERTIFIED FISHERIES SHARE OF B.C. CAPTURE FISHERIES



## ► GROWTH IN NUMBER OF MSC CERTIFIED FISHERIES IN B.C.



*In 2011, B.C. Spiny dogfish and pink salmon achieved MSC certification.*

# The SHELLFISH Story

*The total shellfish harvest from the capture fisheries and culture operations remained constant at 24,400 tonnes and contributed nine per cent to the total B.C. seafood harvest.*

Cultured shellfish production fell by seven per cent to 9,400 tonnes in 2011 while capture shellfish production increased by more than four per cent to 15,000 tonnes.

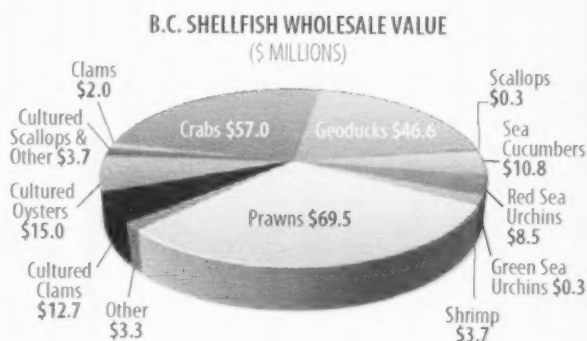
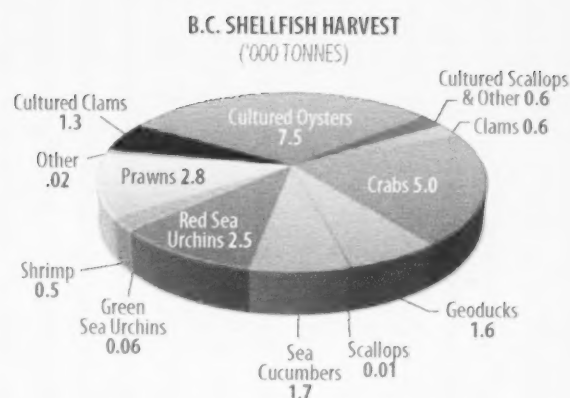
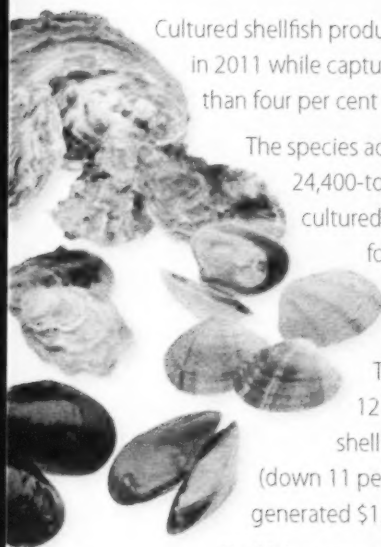
The species accounting for the largest shares of the 24,400-tonne shellfish harvest in 2011 included cultured oysters with production of 7,500 tonnes, followed by crabs at 5,000 tonnes, prawns at 2,800 tonnes and red sea urchins at 2,500 tonnes.

The total landed value for shellfish rose 12 per cent to \$146.3 million. Cultured shellfish operations generated \$19.6 million (down 11 per cent over 2010) and wild shellfisheries generated \$126.7 million (up 16 per cent).

Shellfish accounted for 18 per cent of the total landed value of B.C. seafood in 2011. Wild geoducks, prawns and crabs recorded the highest landed values of all shellfish species by far at \$41.3 million, \$40 million and \$32.5 million respectively. These three fisheries contributed 78 per cent of the total landed value of British Columbia's shellfish harvest in 2011.

The wholesale value of B.C. shellfish products rose four per cent to \$233.4 million in 2011. The wholesale value of cultured shellfish, at \$31.4 million, accounted for 13 per cent of total B.C. shellfish sales, while capture shellfish products generated \$202 million and accounted for the remaining 87 per cent share.

Top export markets for B.C. shellfish products in 2011 were China, Japan, Hong Kong, U.S., Taiwan and Singapore.



## ► The **EXPORT MARKET** Story

*About 80 per cent of British Columbia's seafood is exported. In 2011, B.C. exported \$911 million worth of seafood products to 73 countries.*

In 2011, 57 per cent of B.C.'s total seafood export value was generated from five species: Atlantic salmon (34 per cent), crabs (six per cent), hake (six per cent), shrimp and prawns (six per cent), and geoduck clams (four per cent).

The major markets for these five species were the United States (predominantly Atlantic salmon), China (crabs), Russian Federation (hake), Japan (shrimp and prawns), and Hong Kong (geoducks).

The most widely exported species included pink salmon shipped to 26 countries, and sockeye salmon, crabs, and sardines each going to 19 different markets.

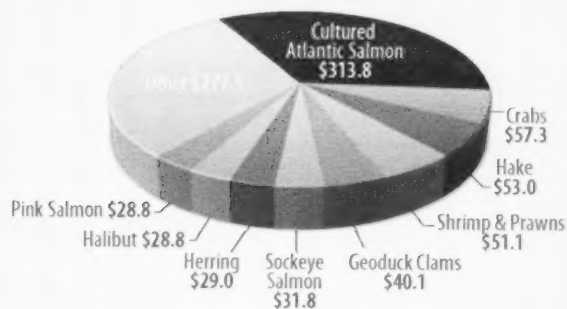
In 2011, 89 per cent of B.C.'s total seafood export value was destined for five countries: the United States (57 per cent), China (12 per cent), Japan (12 per cent), Hong Kong (5 per cent), and Russian Federation (3 per cent).

The countries to which B.C. exported the greatest number of seafood products were the United States (118 products), Hong Kong (70 products), China (68 products), Japan (59 products), and Taiwan (43 products).

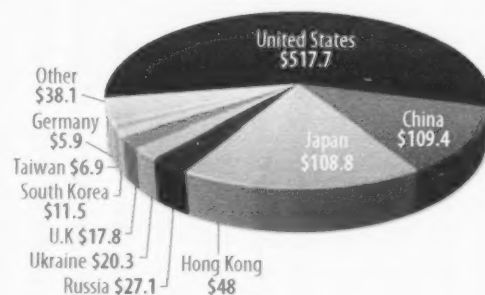
Among the major categories of seafood products, shellfish and marine plant exports rose to \$189.6 million in 2011, a nine per cent increase over 2010. Exports of other seafood products rose six per cent to \$37.4 million and exports of groundfish increased by two per cent to \$153.4 million. Conversely, exports of salmon decreased by almost nine per cent to \$467.2 million, down from the record high in 2010.

B.C. seafood products reporting the largest increase in export value, from 2010 to 2011, included wild chum salmon (up 234 per cent to \$9.9 million), flour, meal, pellets for non-human consumption (up 98 per cent to \$3.7 million), and shrimp and prawns (up 67 per cent to \$51.1 million). Seafood products reporting the largest decline in export value were sockeye salmon (down 69 per cent to \$32 million), herring (down 40 per cent to \$29 million), and clams (down 30 per cent to \$7 million).

**B.C. SEAFOOD EXPORT VALUE BY SPECIES**  
(\$ MILLIONS)



**B.C. SEAFOOD EXPORT MARKETS BY VALUE**  
(\$ MILLIONS)



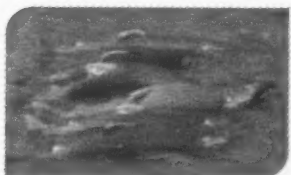
## ► Significant Events in

# BRITISH COLUMBIA'S SEAFOOD SECTOR – 2011/12



### ► BUY LOCAL PROGRAM

On August 30, 2012 the B.C. government announced an investment of \$2 million to help B.C. farmers and food processors promote local foods through a Buy Local program. Eligible participants will have their contributions matched in campaigns to promote B.C. food, seafood, agricultural products and agritourism in B.C. **MORE INFO:** <http://www.gov.bc.ca/agri/buylocal.html>



### ► COMMISSION OF INQUIRY INTO THE DECLINE OF SOCKEYE SALMON IN THE FRASER RIVER

In response to the poor returns in the Fraser River sockeye fishery, the Cohen Commission was established in 2009 to investigate and report the reasons for this decline. The appointed Commissioner, the Honourable Bruce Cohen, provided 75 recommendations to improve the future sustainability of this fishery.

**MORE INFO:** <http://www.cohencommission.ca>

**BCSEAFOOD.CA**  
BRITISH COLUMBIA

### ► INTERNATIONAL PROMOTION OF B.C. SEAFOOD

The Ministry of Agriculture, in coordination with the Ministry of Jobs, Tourism and Skills Training showcased B.C. seafood products internationally at the 2011 and 2012 European Seafood Exposition in Brussels, Belgium as well as the 2011 and 2012 China Fisheries & Seafood Expositions in China. These events were well attended by B.C. seafood industry representatives and provided an opportunity to develop and strengthen relationships in the international market.

#### **MORE INFO:**

China Fisheries & Seafood Exposition: Dalian, China [www.chinaseafoodexpo.com/](http://www.chinaseafoodexpo.com/)

B.C. seafood China blog [http://blog.gov.bc.ca/bctradeinvest/2012/10/29/china\\_seafood/](http://blog.gov.bc.ca/bctradeinvest/2012/10/29/china_seafood/)

B.C. online feature page <http://www.britishcolumbia.ca/seafood/Pages/seafood.aspx>

European Seafood Exposition: Brussels, Belgium [www.euroseafood.com](http://www.euroseafood.com)

B.C. seafood Brussels blog <http://blog.gov.bc.ca/bctradeinvest/2012/04/05/brussels-seafood-expo/>



### ► AQUACULTURE INNOVATION AND MARKET ACCESS PROGRAM (AIMAP)

The federal AIMAP program provides funding support for aquaculture projects related to species diversification, green technology, sustainable production and market access. The one-year duration projects must have demonstrable industry-wide benefits implemented by the end of the project. In 2011, over \$1.9 million in AIMAP funding contributions were provided to B.C. aquaculture for 12 projects with a total investment of \$11.7 million. These funds support a diverse range of sectors and initiatives including: farmed salmon, sturgeon, sablefish, fish waste utilization and shellfish culture technology (mussels, geoduck, oysters, and scallops).

#### **MORE INFO:**

<http://www.dfo-mpo.gc.ca/aquaculture/sustainable-durable/projects-2011-12-projets-eng.htm>



FROM CANADA'S PACIFIC COAST

# A Taste of the Pristine

BRITISH COLUMBIA SEAFOOD... A COMMITMENT TO QUALITY AND SUSTAINABILITY



## WILD AND FARMED FINFISH

Chinook Salmon  
Chum Salmon  
Coho Salmon  
Pink Salmon   
Sockeye Salmon   
Albacore Tuna   
Herring & Sardines  
Farmed Atlantic Salmon  
Farmed Chinook Salmon

## WILD AND FARMED SHELLFISH

Crabs  
Geoduck  
Prawn & Shrimp  
Wild Scallops  
Sea Cucumber  
Sea Urchins  
Farmed Clams  
Farmed Oysters  
Farmed Scallops

## GROUNDFISH

Arrowtooth  
Dogfish   
Hake   
Halibut   
Lingcod  
Pacific Cod  
Pollock  
Rockfish  
Sablefish   
Soles

For more information on the species and products supplied by the British Columbia seafood industry to the global market visit us at [www.bcseafood.ca](http://www.bcseafood.ca)

**BCSEAFOOD.CA**  
BRITISH COLUMBIA



Marine Stewardship Council (MSC) certified fisheries.  
For more information on the MSC visit [www.msc.org](http://www.msc.org)



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## ► DATA SOURCES / MORE INFORMATION

### ► DATA SOURCES

All aquaculture industry harvests and farm-gate values compiled by the Ministry of Agriculture.  
All seafood finished products and wholesale values compiled by the Ministry of Agriculture.  
All capture fisheries landings provided by Fisheries and Oceans Canada, Pacific Region.  
Export data provided by Statistics Canada through the Global Trade Atlas and CATSNET databases.

### ► CONTACT INFORMATION

This report is available online at [www.bcseafood.ca](http://www.bcseafood.ca)

For more information on B.C. seafood products and suppliers please contact:

Ministry of Agriculture

PO Box 9120 Stn Prov Gov | Victoria, B.C. V8W 9B4

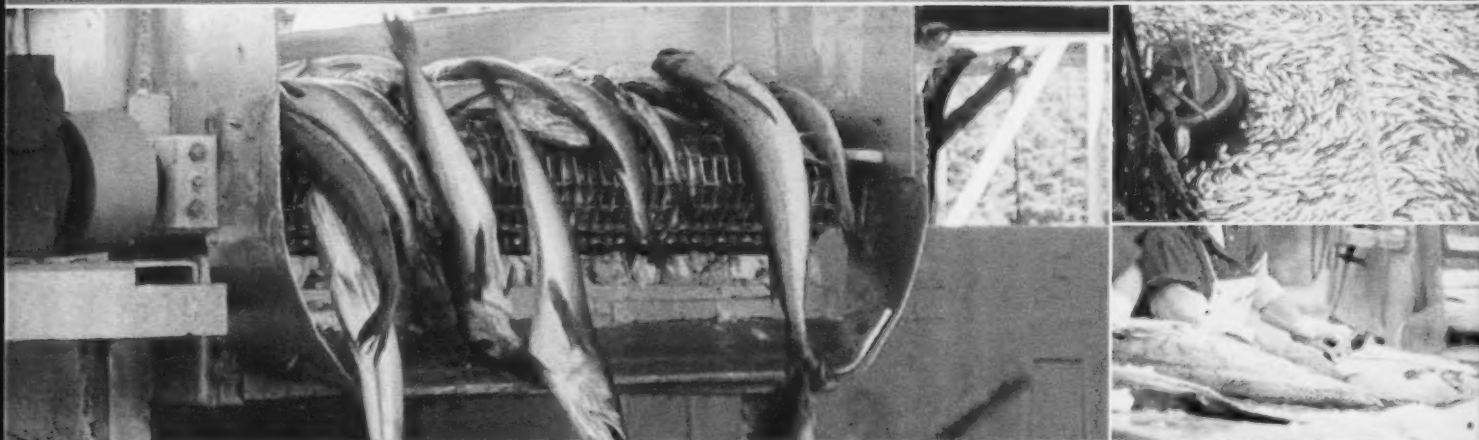
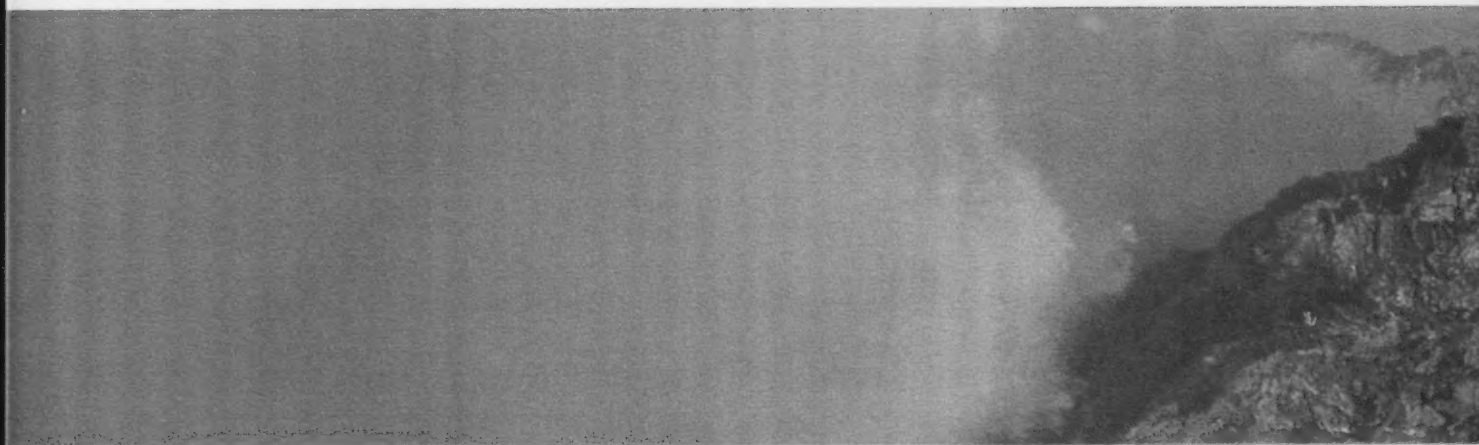
Email: [fishstats@gov.bc.ca](mailto:fishstats@gov.bc.ca)

For more information on B.C.'s agrifood industry, please visit <http://www.al.gov.bc.ca/stats/>

For more information on the Province of British Columbia, please visit [www.britishcolumbia.ca](http://www.britishcolumbia.ca)

November 2012





BRITISH  
COLUMBIA

Ministry of  
Agriculture